

VITA/TCE PRE-FILING CHECK LIST

Use this checklist to bring the required information to assist you at the time of your appointment. This information will help you avoid filing and processing delays. If you are filing a joint return, both you and your spouse must be present.

- ☐ Valid photo identification (self and spouse)
- ☐ Social security cards or Individual Taxpayer Identification Number (ITIN), and birth dates for you, your spouse, and dependents
- ☐ Last year's federal and state tax returns
- ☐ Income documents you received during the year:
 - Wage statements (W-2 or 1099)
 - Interest and dividend statements (1099-INT, 1099-DIV)
 - Retirement statements (1099-R)
 - Social security statements (SSA-1099)
 - Unemployment compensation (1099-G)
- ☐ College tuition and student loan interest and expense (1098-T)
- ☐ Contributions to Wisconsin EdVest or Tomorrow's Scholar Account
- ☐ Alimony paid or received
- ☐ Childcare expenses with provider's address and Social Security Number or Employer Identification Number (EIN)
- ☐ Proof of bank account and routing information or blank check
- ☐ Proof of healthcare insurance (1095-A, B or C statement) or exemption certificate
- ☐ IRS or Wisconsin Department of Revenue notices

If you are claiming homestead credit, you must also provide:

- ☐ Copy of 2017 property tax bill or rent certificate signed by your landlord
- ☐ Record of any 2017 Wisconsin Works (W-2) payments
- ☐ Record of 2017 SSI payments from the Social Security Administration and the Wisconsin Department of Health Services
- ☐ Proof of earned income if both you and your spouse are under age 62 and not disabled
- ☐ Proof of disability (if under age 62):
 - Statement from Veteran's Administration certifying that claimant is receiving disability benefit due to 100% disability, or
 - Document from Social Security Administration stating date disability began, or
 - Statement from physician stating beginning date of disability and whether disability is permanent or temporary

For a complete list of all VITA-TCE sites, call 2-1-1.

HOMESTEAD CREDIT

The Homestead Credit program is designed to soften the impact of property taxes and rent on persons with lower incomes. The benefit available may be an income tax credit or a direct refund. The credit is based on your household income and allowable property taxes and/or rent for the calendar year.

You may claim homestead credit if:

- You are 18 years of age or older at the end of the year
- You meet one of the following conditions:
 - You have earned income during the year
 - You (or your spouse) are disabled
 - You (or your spouse) are 62 years of age or older at the end of the year
- You occupied and owned or rented during the year a home, apartment, or other dwelling that is subject to Wisconsin property taxes
- You are a legal resident of Wisconsin all year
- Your household income was less than \$24,680
- You cannot be claimed as a dependent for the year on someone else's federal income tax return (this qualification does not apply if you are 62 years of age or older at the end of the year)
- You (and your spouse) will not claim farmland preservation credit for the same year or the veterans and surviving spouses property tax credit based on the same property taxes